

Getting Started...


Three easy steps to file

1. Registering as an E-Client
2. Securing Your Information
3. Filing Your Return/Prepayment

Information needed to E-file

- Copy of a current or prior tax return sent to you from the Board of Equalization (BOE).
- Type of ownership
- E-mail address
- Blank check (bank routing and account number) or credit card number (VISA, MasterCard, American Express or Discover).
- Information to complete and file your return for the period (e.g., sales and deductions).

Helpful Hints

- Do not use your browser's Back or Forward buttons during this process (use only the buttons inside the BOE-file system).
- When paying by credit card, make sure to return to BOE-file to complete your return filing.
- Print your confirmation page(s).
- Refer to the  in the BOE-file system for additional information at any step.
- Refer to our website for a list of Frequently Asked Questions.

BOE-file

Let us do the math for you!
Fast. Easy. Accurate. Paperless.

Save this for future use

Account Number _____

Personal ID Code (PIC) _____

User ID _____

Password _____

State Board of Equalization

Members

Betty T. Yee
San Francisco

Bill Leonard
Ontario/Sacramento

Michelle Steel
Rolling Hills Estates

Judy Chu, Ph.D.
Los Angeles

John Chiang
State Controller

Ramon J. Hirsig
Executive Director

Board website and Member
contact information:
www.boe.ca.gov

Taxpayers' Rights Advocate
888-324-2798

Information Center
800-400-7115
TDD/TTY: **800-735-2929**



**The easy paperless way
to file your tax return!**


BOE-file USER'S GUIDE

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Step 1

Registering as an E-Client

1. Go to www.boe.ca.gov and click on the E-file logo on the top left.
2. Select *BOE-file* and click on *Register to BOE-file*.
3. Enter the following information:
 - Tax program (sales and use tax)
 - Account number (seller's permit)
 - Owner name
 - Your relationship to the account (from drop down box)
 - E-mail address (for person filing)
 - Business e-mail address (if different)
 - Return code information (click the  for information on where to find these codes)
 - Personal Identification Code (PIC) Please remember to save this 4-digit code for future use (see reverse side of this pamphlet).
4. Retrieve the e-mails sent to you from the BOE that contain your User ID and default password and proceed to **Step 2**.

**Log on to our website at
www.boe.ca.gov
and
E-File today!**

Step 2

Securing Your Information

1. Click on *Log in to E-File* from the top navigation bar.
2. Enter the User ID and default password provided in the e-mails (password is case sensitive).
3. Enter your PIC (selected in **Step 1**).
4. Change your default password. You may also change your User ID (recommended). Please remember to save this information for future use.
5. Create or select a forgotten password question. This will allow you to reset your password without having to contact the BOE to have your password reset.
6. Click *Submit* to begin e-filing (**Step 3**).

Note

E-Services Main Menu Selections

Upon completion of **Step 2**, you will have the permission and the ability to perform the following functions that are available from the main menu:

Account Maintenance

- Discontinue receipt of paper returns. You will receive an e-mail reminding you to e-file your return instead of being mailed a paper return.
- Change the business e-mail address for the account.

User Maintenance

- Change User ID, Password, and/or e-client e-mail address.
- Add or change a forgotten password question.

File a Return or Prepayment

Step 3

Filing Your Return or Prepayment

1. Enter your account number (numeric portion only).
2. Read the Declaration of Intent to File terms and if acceptable, click *Accept*.
3. Enter your return/prepayment information.
4. Verify that the information on the Review Filing page is correct.
5. Click *Continue* and you will be taken to the File and Pay page.
6. Enter the preparer information.
7. Select a payment option. There are currently two payment methods:

Automated Clearinghouse Debit (ACH)

- Enter your bank routing number and checking account number.
- Payments may be held for any day you select up to the due date of the return or prepayment.

Credit Card Payment*

- Complete the payment process with the third-party vendor and click *Continue* to be routed back to the BOE-file system to complete your return filing.
8. Click the *File My Return* and you will receive your confirmation page. Please print this page for your records.

*Please note that a convenience fee of 2.5% of the transaction amount will be charged by the credit card processing vendor. This fee is not revenue to the BOE.